

Actuarial Menu

Actuarial Services to Fit Your Needs

At Pinnacle Plan Design we offer a menu of services, then tailor a package to meet your needs. You maintain control of your client relationship and partner with us for the actuarial services you need.

“Just the Basics”
Preparation of Schedule SB
Actuarial Certification
Computations of Annual Cost (minimum required, maximum deductible, recommended)
Participants Statements
Preparation of PBGC Comprehensive Premium Filing (if applicable)
Preparation of PBGC Annual Funding Notice (if applicable)
Computations Regarding Passage of Non-Discrimination Testing (if applicable)
Co-branding With Pinnacle Plan Design and Your Firm (if desired)
“Full Administration”
Preparation of Form 5500 Series
Preparation of Summary Annual Report
Preparation of Form 8955-SSA
Preparation of Distribution Paperwork (as needed)
Trust Accounting
“Design and Document Services”
Design of Defined Benefit Plan
Preparation of Defined Benefit Plan Document
"Other Services"
Estimates for Planning/Forecasting
Communication with Client
Cash Balance Education for your TPA Professionals
Marketing Materials
Human Resources (HR) Consulting

Retirement Plan Design ▲ Administration ▲ Consulting ▲ Actuarial Services

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Tucson | Phoenix | Houston